

CLAIMS

WHAT IS CLAIMED IS:

1. A method for providing an investment structure, comprising:
 - receiving funds to be invested;
 - investing a first portion of the funds in a fixed component generating principal plus fixed interest;
 - investing a second portion of the funds in a contingent component generating contingent interest;
 - re-investing at least a portion of the fixed interest in the fixed component; and
 - re-investing at least a portion of the contingent interest in the contingent component.
2. The method of claim 1, further including using a trustee for investing the fixed component and using a partnership for investing the contingent component.
3. The method of claim 1 wherein:
 - the investing the first portion step includes investing sixty to ninety percent of the funds in the fixed component; and
 - the investing the second portion step includes investing ten to forty percent of the funds in the contingent component.

4. The method of claim 1 wherein the investing the first portion step includes investing the fixed component in one or more of the following: treasury notes, AAA-rated securities, AA-rated securities, municipal bond notes, or variable rate notes.

5. The method of claim 1 wherein the investing the second portion step includes investing the contingent component in one or more of the following: futures, options, or forward positions.

6. The method of claim 1, further including distributing the fixed component, the contingent component, the fixed interest, and the contingent interest after an investment period.

7. A method for providing an investment structure, comprising:

- receiving funds to be invested;
- investing a first portion of the funds in a fixed component generating principal plus fixed interest;
- investing a second portion of the funds in a contingent component generating contingent interest;
- distributing at least a portion of the fixed interest; and
- re-investing at least a portion of the contingent interest in the contingent component.

8. The method of claim 7, further including using a trustee for investing the fixed component and using a partnership for investing the contingent component.

9. The method of claim 7 wherein:

the investing the first portion step includes investing sixty to ninety percent of the funds in the fixed component; and

the investing the second portion step includes investing ten to forty percent of the funds in the contingent component.

10. The method of claim 7 wherein the investing the first portion step includes investing the fixed component in one or more of the following: treasury notes, AAA-rated securities, AA-rated securities, municipal bond notes, or variable rate notes.

11. The method of claim 7 wherein the investing the second portion step includes investing the contingent component in one or more of the following: futures, options, or forward positions.

12. The method of claim 7, further including distributing the fixed component, the contingent component, and the contingent interest after an investment period.

13. A method for providing an investment structure, comprising:

receiving funds to be invested;

investing a first portion of the funds in a fixed component generating principal plus fixed interest;

investing a second portion of the funds in a contingent component generating contingent interest;

re-investing at least a portion of the fixed interest in the fixed component; and
distributing at least a portion of the contingent interest.

14. The method of claim 13, further including using a trustee for investing the fixed component and using a partnership for investing the contingent component.

15. The method of claim 13 wherein:

the investing the first portion step includes investing sixty to ninety percent of the funds in the fixed component; and

the investing the second portion step includes investing ten to forty percent of the funds in the contingent component.

16. The method of claim 13 wherein the investing the first portion step includes investing the fixed component in one or more of the following: treasury notes, AAA-rated securities, AA-rated securities, municipal bond notes, or variable rate notes.

17. The method of claim 13 wherein the investing the second portion step includes investing the contingent component in one or more of the following: futures, options, or forward positions.

18. The method of claim 13, further including distributing the fixed component, the contingent component, and the fixed interest after an investment period.

19. A method for providing an investment structure, comprising:

- receiving a plurality of funds to be invested;
- investing first portions of the plurality of funds in a pooled fixed component generating principal plus pooled fixed interest;
- investing second portions of the plurality of funds in a pooled contingent component generating pooled contingent interest;
- re-investing at least a portion of the pooled fixed interest in the pooled fixed component; and
- re-investing at least a portion of the pooled contingent interest in the pooled contingent component.

20. The method of claim 19, further including using a trustee for investing the pooled fixed component and using a partnership for investing the pooled contingent component.

21. The method of claim 19 wherein:

the investing the first portions step includes investing sixty to ninety percent of each of the funds in the pooled fixed component; and

the investing the second portions step includes investing ten to forty percent of each of the funds in the pooled contingent component.

22. The method of claim 19 wherein the investing the first portions step includes investing the pooled fixed component in one or more of the following: treasury notes, AAA-rated securities, AA-rated securities, municipal bond notes, or variable rate notes.

23. The method of claim 19 wherein the investing the second portions step includes investing the pooled contingent component in one or more of the following: futures, options, or forward positions.

24. The method of claim 19, further including distributing the pooled fixed component, the pooled contingent component, the pooled fixed interest, and the pooled contingent interest after an investment period.

25. A method for providing an investment structure, comprising:
receiving a plurality of funds to be invested;

investing first portions of the plurality of funds in a pooled fixed component
generating principal plus pooled fixed interest;

investing second portions of the plurality of funds in a pooled contingent component
generating pooled contingent interest;

distributing at least a portion of the pooled fixed interest; and

re-investing at least a portion of the pooled contingent interest in the pooled
contingent component.

26. The method of claim 25, further including using a trustee for investing the pooled
fixed component and using a partnership for investing the pooled contingent component.

27. The method of claim 25 wherein:

the investing the first portions step includes investing sixty to ninety percent of each
of the funds in the pooled fixed component; and

the investing the second portions step includes investing ten to forty percent of each
of the funds in the pooled contingent component.

28. The method of claim 25 wherein the investing the first portions step includes
investing the pooled fixed component in one or more of the following: treasury notes,
AAA-rated securities, AA-rated securities, municipal bond notes, or variable rate notes.

29. The method of claim 25 wherein the investing the second portions step includes investing the pooled contingent component in one or more of the following: futures, options, or forward positions.

30. The method of claim 25, further including distributing the pooled fixed component, the pooled contingent component, and the pooled contingent interest after an investment period.

31. A method for providing an investment structure, comprising:

receiving a plurality of funds to be invested;

investing first portions of the plurality of funds in a pooled fixed component generating principal plus pooled fixed interest;

investing second portions of a first set of the plurality of funds in a pooled distribution contingent component generating first pooled contingent interest;

investing second portions of a second set of the plurality of funds in a pooled re-investment contingent component generating second pooled contingent interest;

distributing at least a portion of the pooled fixed interest;

distributing at least a portion of the first pooled contingent interest; and

re-investing at least a portion of the second pooled contingent interest in the pooled re-investment contingent component.

32. The method of claim 31, further including using a trustee for investing the pooled fixed component and using a partnership for investing the pooled distribution contingent component and the pooled re-investment contingent component.

33. The method of claim 31 wherein:

the investing the first portions step includes investing sixty to ninety percent of each of the funds in the pooled fixed component;

the investing the second portions of the first set step includes investing ten to forty percent of each of the first set of funds in the pooled distribution contingent component; and

the investing the second portions of the second set step includes investing ten to forty percent of each of the second set of funds in the pooled re-investment contingent component.

34. The method of claim 31 wherein the investing the first portions step includes investing the pooled fixed component in one or more of the following: treasury notes, AAA-rated securities, AA-rated securities, municipal bond notes, or variable rate notes.

35. The method of claim 31 wherein the investing the second portions steps include investing the pooled distribution contingent component and the pooled re-investment contingent component in one or more of the following: futures, options, or forward positions.

47. The investment structure of claim 43 wherein the contingent component invests the second portion in one or more of the following: futures, options, or forward positions.

48. The investment structure of claim 43 wherein the fixed component and the contingent component invest the first and second portions of the funds for an investment period.

49. An investment structure, comprising:

a fixed component investing a first portion of funds and generating principal plus fixed interest; and

a contingent component investing a second portion of the funds and generating contingent interest,

wherein at least a portion of the fixed interest is distributed and at least a portion of the contingent interest is re-invested in the contingent component.

50. The investment structure of claim 49 wherein a trustee invests the fixed component and a partnership invests the contingent component.

51. The investment structure of claim 49 wherein:

the fixed component invests sixty to ninety percent of the funds; and

the contingent component invests ten to forty percent of the funds.

52. The investment structure of claim 49 wherein the fixed component invests the first portion in one or more of the following: treasury notes, AAA-rated securities, AA-rated securities, municipal bond notes, or variable rate notes.

53. The investment structure of claim 49 wherein the contingent component invests the second portion in one or more of the following: futures, options, or forward positions.

54. The investment structure of claim 49 wherein the fixed component and the contingent component invest the first and second portions of the funds for an investment period.

55. An investment structure, comprising:
a fixed component investing a first portion of funds and generating principal plus fixed interest; and
a contingent component investing a second portion of the funds and generating contingent interest,
wherein at least a portion of the fixed interest is re-invested in the fixed component and at least a portion of the contingent interest is distributed.

56. The investment structure of claim 55 wherein a trustee invests the fixed component and a partnership invests the contingent component.

57. The investment structure of claim 55 wherein:

the contingent component invests ten to forty percent of the funds.

58. The investment structure of claim 55 wherein the fixed component invests the first portion in one or more of the following: treasury notes, AAA-rated securities, AA-rated securities, municipal bond notes, or variable rate notes.

59. The investment structure of claim 55 wherein the contingent component invests the second portion in one or more of the following: futures, options, or forward positions.

60. The investment structure of claim 55 wherein the fixed component and the contingent component invest the first and second portions of the funds for an investment period.

61. An investment structure, comprising:

a pooled fixed component investing first portions of a plurality of funds and generating principal plus pooled fixed interest; and

a pooled contingent component investing second portions of the plurality of funds
and generating pooled contingent interest,

wherein at least a portion of the pooled fixed interest is re-invested in the pooled fixed component and at least a portion of the pooled contingent interest is re-invested in the pooled contingent component.

62. The investment structure of claim 61 wherein a trustee invests the pooled fixed component and a partnership invests the pooled contingent component.

63. The investment structure of claim 61 wherein:
the pooled fixed component invests sixty to ninety percent of each of the funds; and
the pooled contingent component invests ten to forty percent of each of the funds.

64. The investment structure of claim 61 wherein the pooled fixed component is invested in one or more of the following: treasury notes, AAA-rated securities, AA-rated securities, municipal bond notes, or variable rate notes.

65. The investment structure of claim 61 wherein the pooled contingent component is invested in one or more of the following: futures, options, or forward positions.

66. The investment structure of claim 61 wherein the pooled fixed component and the pooled contingent component invest the first and second portions of each of the funds for an investment period.

67. An investment structure, comprising:

a pooled fixed component investing first portions of a plurality of funds and generating principal plus pooled fixed interest; and

a pooled contingent component investing second portions of the plurality of funds and generating pooled contingent interest,

wherein at least a portion of the pooled fixed interest is distributed and at least a portion of the pooled contingent interest is re-invested in the pooled contingent component.

68. The investment structure of claim 67 wherein a trustee invests the pooled fixed component and a partnership invests the pooled contingent component.

69. The investment structure of claim 67 wherein:

the pooled fixed component invests sixty to ninety percent of each of the funds; and

the pooled contingent component invests ten to forty percent of each of the funds.

70. The investment structure of claim 67 wherein the pooled fixed component is invested in one or more of the following: treasury notes, AAA-rated securities, AA-rated securities, municipal bond notes, or variable rate notes.

71. The investment structure of claim 67 wherein the pooled contingent component is invested in one or more of the following: futures, options, or forward positions.

the pooled distribution contingent component invests ten to forty percent of each of first set of the funds; and

the pooled re-investment contingent component invests ten to forty percent of each of second set of the funds.

76. The investment structure of claim 73 wherein the pooled fixed component is invested in one or more of the following: treasury notes, AAA-rated securities, AA-rated securities, municipal bond notes, or variable rate notes.

77. The investment structure of claim 73 wherein the pooled distribution contingent component and the pooled re-investment contingent component are invested in one or more of the following: futures, options, or forward positions.

78. The investment structure of claim 73 wherein the pooled fixed component, the pooled distribution contingent component, and the pooled re-investment contingent component invest the first and second portions of each of the funds for an investment period.

79. An investment structure, comprising:
a pooled fixed component investing first portions of a plurality of funds and generating principal plus pooled fixed interest;

a pooled distribution contingent component investing second portions of a first set of the plurality of funds and generating first pooled contingent interest; and

a pooled re-investment contingent component investing second portions of a second set of the plurality of funds and generating second pooled contingent interest,

wherein at least a portion of the pooled fixed interest is re-invested in the pooled fixed component, at least a portion of the first pooled contingent interest is distributed, and at least a portion of the second pooled contingent interest is re-invested in the pooled re-investment contingent component.

80. The investment structure of claim 79 wherein a trustee invests the pooled fixed component and a partnership invests the pooled distribution contingent component and the pooled re-investment contingent component.

81. The investment structure of claim 79 wherein:

the pooled fixed component invests sixty to ninety percent of each of the funds;

the pooled distribution contingent component invests ten to forty percent of each of first set of the funds; and

the pooled re-investment contingent component invests ten to forty percent of each of second set of the funds.

82. The investment structure of claim 79 wherein the pooled fixed component is invested in one or more of the following: treasury notes, AAA-rated securities, AA-rated securities, municipal bond notes, or variable rate notes.

83. The investment structure of claim 79 wherein the pooled distribution contingent component and the pooled re-investment contingent component are invested in one or more of the following: futures, options, or forward positions.

84. The investment structure of claim 79 wherein the pooled fixed component, the pooled distribution contingent component, and the pooled re-investment contingent component invest the first and second portions of each of the funds for an investment period.

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